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PURCHASING USER MANUAL

CREATING AND USING A REQUISITION TEMPLATE

INTRODUCTION

A requisition template can be created in order to reuse the line items and fiscal coding on future requisitions. A new requisition made from a template can then be added to or modified as needed to complete for purchasing.

A template can be created either from an existing requisition or requisition that you have just saved, or a template can be created on its own to be used later for a new requisition. The important distinction is that a requisition saved as a template must first be saved as a requisition; therefore you will have both a requisition and a template. Be aware of this if you intend to create only a template.

TO CREATE ONLY A TEMPLATE

1. Click the **Status** tab.
2. Check the **Template** check box.
3. Click **Find**.
4. Click the **Template** tab.

Figure 1 - Template tab

The screenshot shows the 'Template' tab selected in a software interface. At the top, there are four tabs: 'Status', 'Template' (which is highlighted in red), 'Approval', and 'Report'. Below the tabs, there is a 'Template' text field and a 'Tracking #' field with the value '513'. To the right of these fields are three buttons: 'New Template', 'Save', and 'Print Preview'. Below the 'Template' field, there is a 'Need by' date field with the value '10/29/2008' and an 'All or Nothing' checkbox. Below the 'Need by' field, there is a 'Desc' text field. Below the 'Desc' field, there is a 'Status' field with the value 'Template' and a 'Requested by' field. Below the 'Requested by' field, there is an 'Edited by' field. At the bottom right, there is a 'Make Requisition' button.

5. Enter a name for the template in the **Template** field.
6. If desired, select a **Need By** date.
7. Enter a **Description**.
8. Click **Save**. NOTE: A department, if used by your agency, is not required (or available) when creating a “stand alone” template. The department will be selected when the requisition is made from the template.

9. Click **Add Item**. Add the **Description**, **Qty**, **Price**, etc as would for a requisition. Add as many line items as needed. See the [Creating a Requisition](#) document for details.
10. If desired, click **Vendor Info** to add a vendor name and address as you would for a requisition.
11. If desired, click **Coding Info** to add fiscal coding as you would a requisition.
12. Click **Save** to save the template.

Figure 2 - Add line items to template

Notes	Atch	Status	Item #	Description	IC*	R	Ref Doc*	Sfx	BEY	Mod	Index*	PCA	ExpSub*	Dtl	RevSub*	Dtl	Gran
			56165	Office Updated		230			2009		1004	04000	5101				SAF

TO CREATE A TEMPLATE FROM A REQUISITION

1. Click the **Requisition** tab.
2. Enter the Requisition as you normally would. See the [Creating a Requisition](#) document for details. (You can complete as much of the requisition as desired, including vendor information and coding information.)
3. When finished with the requisition, click **Make Template**.

Figure 3 - Make Template

Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal	Workflow
		Awaiting Fiscal Coding	5654651	Elec Components	85	Each	6.00	510.00	Admin

4. The **Requisitions** tab changes to the **Template** tab. You can make more changes or additions to the template as needed. For example, you may want to change the **Description** since it is probably something unique to the requisition that you have saved. Otherwise your template will be saved with the same description as the requisition.

5. Click **Save** to save the template.
6. To finish with the requisition, select it from the **Status** screen.

TO USE A TEMPLATE TO MAKE A REQUISITION

1. Select **Requisitions**.
2. Click the **Status** tab.
3. Check the **Template** check box.
4. Click **Find**.

Figure 4 - Template check box on the Status screen

The screenshot shows the 'Status' tab selected in the top navigation bar. Below the navigation bar, there are search filters: 'Req #' (empty), 'Tracking #' (empty), 'Status' (dropdown menu showing 'Active or recently received'), and 'Request Date Range' (dropdown menu showing 'All Requisitions'). A red circle highlights the 'Templates' checkbox, which is checked. Below these filters, there is a 'Find' button and a 'Reset' button. At the bottom, there is a table with columns: 'Trk #', 'Req #', 'Requester', 'Req'd Date', 'Description', and 'Status'. The table contains one row with the following data: 'Edit', '512', 'BLT08001', 'JAMES CARTER', '10/22/2008', 'Electrical Components', and 'Template'.

5. Locate the template to use and click **Edit**.
6. Click **Make Requisition**.

Figure 5 - Make Requisition

The screenshot shows the 'Make Requisition' screen. The top navigation bar has 'Status', 'Template', 'Approval', and 'Report' tabs. The 'Template' tab is selected. Below the navigation bar, there are fields for 'Department' (WRD: Word Processing), 'Template' (BLT08001), and 'Tracking #' (512). There are buttons for 'New Template', 'Save', and 'Print Preview'. Below these fields, there is a 'Need by' date (10/29/2008), a checkbox for 'All or Nothing', and a 'Req Notes' field. The 'Desc' field contains 'Electrical Components'. The 'Status' is 'Template'. Below this, there are fields for 'Requested by' (JAMES CARTER (10/22/2008)) and 'Edited by' (JAMES CARTER (10/22/2008)). A red circle highlights the 'Make Requisition' button. Below the main form, there is an 'Add Item' button and a 'Clear All Items' button. At the bottom, there is a table with columns: 'Notes', 'Atch', 'Status', 'Item #', 'Description', 'Qty', 'U/M*', 'Price', 'SubTotal', and 'Workflow'. The table contains one row with the following data: 'Menu', '5654851', 'Elec Components', '40', 'Each', '6.00', '240.00', and 'Admin'. The total amount is \$240.00.

7. Enter (or change) the **Description** and make any necessary changes to the itemized list or add additional items.
8. If desired, click **Vendor Info** to add or change a vendor name and address.
9. If desired, click **Coding Info** to add or change the fiscal coding.
10. Click **Itemize Complete** (this will save the requisition and make it ready for approval) or click **Save** if you want to save the requisition and add to or change it later.